

## Reports Module:

### Table of Contents

Summary .....	2
Ad Hoc Reports .....	2
Transaction Details .....	2
Transaction Summary .....	3
Exceptions .....	3
My Flexible Exception Reports .....	5
Add Exception .....	5
View Exception Reports .....	8
View Details for Exception Report .....	9
Edit Exception Report   Clone Exception Report .....	9
Delete Exception Report .....	9
View Exception Report .....	9
Standard Reports .....	10
View Standard Reports .....	10
Retrieve Standard Reports .....	10
Manage Standard Report Delivery Preferences .....	10
Custom Reports .....	11
Create Custom Report .....	12
View My Templates .....	16
Run (Template) Now .....	17
Edit Template .....	18
Share (Template) .....	18
Clone (Template) .....	20
Delete (Template) .....	21
View My (Scheduled) Reports .....	21
Download (Report) .....	22
Delete (Report) .....	22
Access Quick Links .....	22
Global Search .....	23

## Summary

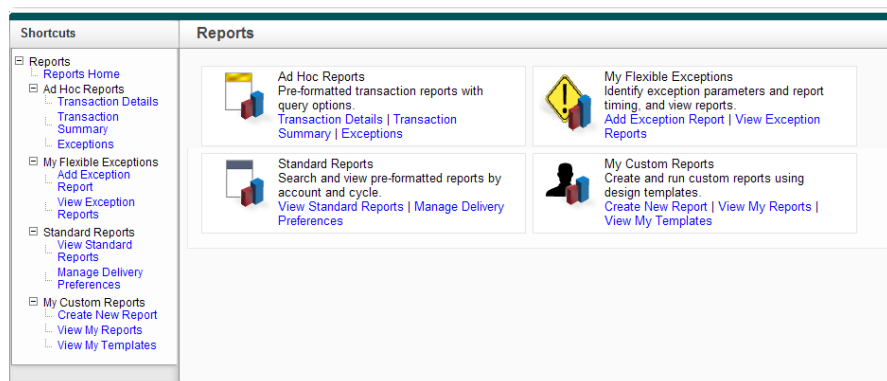
The application offers various reporting tools to meet your analysis needs. The reporting options include:

**Ad Hoc Reports** = Allows you to analyze transactions at a summary and detail level, and also permits you to identify transactions that meet your exception criteria.

**My Flexible Exception Reports** = Offers you the opportunity to establish exception parameters and receive reporting when transactions trigger an exception.

**Standard Reports** = Provides an online avenue by which to download any reporting products to which you subscribed for your accounts.

**My Custom Reports** = Permits you to utilize system templates to create your own customized reporting products.



## Ad Hoc Reports

This function allows you to run quick data queries using certain parameters. Report options include: Transaction Details, Transaction Summary, and Exceptions.

### Transaction Details

Step 1: Shortcuts > Ad Hoc Reports > Transaction Details or click **Transaction Details** from the Ad Hoc Reports tile on the Reports landing page. The application will initiate the Transaction Details workflow.

Step 2: Select the hierarchy level/account for which to generate the Transaction Details report. The children accounts affiliated to the account that you select will be included on the report.

Step 3: Once you have made your selection, click **Next**. The application will render the Transaction Details filter page.

Step 4: Enter your Date Criteria, using the fields provided. Enter any additional Query Criteria, if desired. Finally, select a Report Format from the options listed on the page. The page offers Search Tips to assist you in optimizing your queries.

Step 5: Once you have completed your filter selections, click **Finish**. Once you have clicked **Finish**, the application will render the report in the format that you specified. Any filter, sorting, or other search criteria that you entered will be displayed in the report header (of the HTML version) of the report.

Step 6: If you have opted to review your report via an HTML format, you will be able to **Download** the report from the HTML view.

### ***Transaction Summary***

Step 1: Shortcuts > Ad Hoc Reports > Transaction Summary or click **Transaction Summary** from the Ad Hoc Reports tile on the Reports landing page. The application will initiate the Transaction Summary workflow.

Step 2: Select the hierarchy level/account for which to generate the Transaction Summary report. The children accounts affiliated to the account that you select will be included on the report.

Step 3: Once you have made your selection, click **Next**. The application will render the Transaction Summary filter page.

Step 4: Enter your Date Criteria, using the fields provided. Enter any additional Query Criteria, if desired. Select a parameter by which to summarize the report. By default, the report will be summarized by Card Number. Finally, select a Report Format from the options listed on the page. The page offers [Search Tips](#) to assist you in optimizing your queries.

Step 5: Once you have completed your filter selections, click **Finish**. Once you have clicked **Finish**, the application will render the report in the format that you specified. Any filter, sorting, or other search criteria that you entered will be displayed in the report header (of the HTML version) of the report.

Step 6: To review the details associated to the item by which you chose to summarize, click on the hyperlinks that appear in the first column of the report. The application will navigate to the Transaction Details report, filtered by the value upon which you clicked.

Step 7: If you have opted to review your report via an HTML format, you will be able to **Download** the report from the HTML view.

### ***Exceptions***

Step 1: Shortcuts > Ad Hoc Reports > Exceptions or click **Exceptions** from the Ad Hoc Reports tile on the Reports landing page. The application will initiate the Exceptions workflow.

Step 2: Select the hierarchy level/account for which to generate the Exception report. The children accounts affiliated to the account that you select will be included on the report.

Step 3: Once you have made your selection, click **Next** to proceed to the next step in the Exception workflow, where you may enter your filter criteria.

Step 4: Enter your Date Criteria, using the fields provided. Enter any additional Query Criteria, if desired. Define your Exception Type using the field provided. Finally, select a Report Format from the options listed on the page. The page offers [Search Tips](#) to assist you in optimizing your queries.

#### **Exception Type Tips:**

Depending upon what Exception Type you select, you may be prompted to enter additional information.

For the After Office Hours Exception Type, you will be required to enter a "start" time in the form of hh:mm:ss. This start time will be filtered against the system default end time of

24:00:00. Any transactions that occur between your start time and 24:00:00 will appear on the Exception Report.

Step 5: Once you have completed your filter selections, click **Finish**. Once you have clicked **Finish**, the application will render the report in the format that you specified. Any filter, sorting, or other search criteria that you entered will be displayed in the report header (of the HTML version) of the report.

Step 6: If you have opted to review your report via an HTML format, you will be able to **Download** the report from the HTML view.

## My Flexible Exception Reports

My Flexible Exception Reports allow you to monitor purchasing that occurs outside your desired purchasing policies. These exceptions are generated on posted transactions. They are not hard authorization controls affecting transactions at the time of purchase. This feature enables you to receive online reports detailing any out-of-policy activity. Exception parameters can be set up based on purchasing related to cards, drivers, or vehicles. Note: Your fleet card program setup determines whether or not you may run reports based upon vehicles, drivers, or both.

### Add Exception

Step 1: Shortcuts > My Flexible Exception Reports > Add Exception Report or click **Add Exception** from the My Flexible Exceptions tile the Reports landing page. The application will initiate the Add Exception workflow.

The screenshot shows a web-based form titled "Add Flexible Exception Report" with a "Print" button in the top right corner. The form is at "Step 1 of 4: Report Set-up". Below the title is a progress bar with four steps: 1 (Report Set-up, highlighted in red), 2 (Define Criteria), 3 (Apply Filters (optional)), and 4 (Save). The form contains the following sections:

- Important Information:** A note stating "Fields marked with an asterisk (\*) are required." Below this is a text input field for "Exception Report Name" with a red asterisk and a "Max of 40 characters" warning.
- Select Hierarchy Level(s) / Account(s):** A note stating "Exception criteria will be applied to all hierarchy levels and accounts at or below the level selected." Below this is a tree view with "Expand / Collapse" controls. The tree shows a hierarchy starting with "Level 1: Corporate Parent Training Demo 2 - 0496001283316", which includes "Level 2: New England Region - 0496001283332" (which in turn includes "Level 3: New England Sales - 0496001284785"), "Level 2: Pacific Northwest Region - 0496001283407", and "Level 2: South Central Region - 0496001283423".
- Select Exception Filter Type:** Radio buttons for "Card" (selected), "Vehicle/Asset", and "Driver".
- Select Notification Option:** Radio buttons for "Global" and "Private" (selected).
- At the bottom are "Back", "Next", and "Cancel" buttons.

Step 2: Enter a name for your exception report (required field).

Step 3: Select the hierarchy level/account for which the exception report should be generated. The children accounts affiliated to the account that you select will be included on the report.

Step 4: Choose your Exception Filter Type (Card, Driver, or Vehicle) and select the Notification Option. If you wish to be the only recipient of this information, choose Private. If you wish other users in your account hierarchy to receive a copy of this report, choose Global. Global recipients will only see transactions affiliated to the account(s) to which they have access.

Step 5: Click **Next** to proceed to the next step in the workflow.



Home | Fleet Manager | Reports | Resource Tools | Administration

Search: -- Select category -- -- Select Filter -- Go Search Tips

Shortcuts

**Add Flexible Exception Report** Print

Step 3 of 4: Apply Filters (optional)

1 - 2 - 3 - 4  
Report Set-up Define Criteria Apply Filters (optional) Save

**Card Filters**

Optional Embossing:

Operator: None Value:

Usage Type:

Operator: None Value:

Select a profile

Authorization Profile: Select -

Back Next Cancel

Step 8: Enter any additional filters, if desired. The filter parameters that are offered via this step will be dependent upon the Exception Filter Type (Card, Driver, or Vehicle) that you selected via step 1.

Step 9: Once you have entered any optional exception criteria, click **Next** to proceed to the next step in the workflow.

Home | Fleet Manager | Reports | Resource Tools | Administration

Search: -- Select category -- -- Select Filter -- Go Search Tips

Shortcuts

**Add Flexible Exception Report** Print

Step 4 of 4: Save

1 - 2 - 3 - 4  
Report Set-up Define Criteria Apply Filters Save

Review the summary information below. If no changes are necessary, select Finish.

**Report Set-up**

Name: Training Flexible Exception 1  
Type: Card  
Notification Level: Private  
Selected Hierarchy Level/Account: South Central Region

**Applied Filters**

**Defined Criteria**

Any transaction amount exceeds: \$75.00  
Fuel transaction amount exceeds: \$50.00  
Fuel purchased is other than: Unleaded Mid-Grade, Unleaded, Unleaded  
Premium  
Number of gallons per transaction exceeds: 50

Back Finish Cancel

Step 10: Review the parameters for your Flexible Exception Report.

Step 11: Click Finish to complete the process. Once you have clicked Finish, the application will render a confirmation page.

Step 12: Click **Back to My Flexible Exception Reports** to navigate to a list view of all your flexible exception reports. Click **Back to Report** to return to the Reports landing page.

Step 13: When a posted transaction that triggers one of your exception criteria, you will be sent an email notification to let you know that there is a report ready for you to review. You will also see an alert on the Home Page in the Important Information section.

## View Exception Reports

Step 1: Shortcuts > My Flexible Exception Reports > View Exception Reports or click on the **My Flexible Exception Reports** hyperlink within the My Flexible Exception Reports tile on the Reports landing page. The application will render the My Flexible Exception Reports page, listing all the Exception Reports available for you to view or manage.

My Flexible Exception Reports 

Search for Report  
You may filter a search by any of the following:

Exception Report Name:  Filter:

Type:  Filter Value:

Show only my exceptions: ☐

Previous | Next      Displaying 1-11 of 11 Records Found.      Results per page:  Go

Name - Type Last Exception Found Date Last Modified Date	Status	Actions
Maine Purchases - Card 8/7/2009 6/26/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Multi Swipes Per Day - Card 8/7/2009 6/9/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Non Fuel - Card 8/7/2009 6/23/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Non Fuel - Card 8/7/2009 6/26/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Number of Trans - Card 8/7/2009 6/26/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Over Tank Capacity - Card 8/7/2009 6/9/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Premium Fuel - Card 8/2/2009 6/26/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Off Days - Driver 6/30/2009 6/29/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Report</a>
Off Days - Driver 6/27/2009 6/26/2009	Inactive	<a href="#">View Report</a>
Maine Purchases - Card 6/24/2009 6/23/2009	Inactive	<a href="#">View Report</a>
Premium Fuel - Card N/A 6/23/2009	Active	<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a>

Previous | Next      Displaying 1-11 of 11 Records Found.



### ***View Details for Exception Report***

Step 1: Click on the Name - Type hyperlink within the list view. The application will render the Flexible Exception Report Detail page.

### ***Edit Exception Report | Clone Exception Report***

The Edit function allows you to view information associated with an existing Flexible Exception Report, and edit that information, as needed.

The Clone function allows you to create a new Flexible Exception Report based upon the parameters that you have already established for an existing Exception Report.

Because these workflows are similar, they are described in tandem, below.

Step 1: Click **Edit** (or **Clone**) under Actions beside the Exception Report. The application will initiate the Edit (or Clone) Flexible Exception Report workflow.

Step 2: Edit the name for your exception report (required), if desired.

Step 3: Select the hierarchy level/account for which the exception report should be generated. The children accounts affiliated to the account that you select will be included on the report.

Step 4: Choose your Exception Filter Type and select the Notification Option.

Step 5: Click **Next** to proceed to the next step in the workflow.

Step 6: Make any necessary updates to your exception criteria.

Step 7: Once you have defined your exception criteria, click **Next** to proceed to the next step in the workflow.

Step 8: Enter any additional filters, if desired.

Step 9: Once you have entered any optional exception criteria, click **Next** to proceed to the next step in the workflow.

Step 10: Review the parameters for your Flexible Exception Report.

Step 11: Click **Finish** to complete the process. Once you have clicked **Finish**, the application will render a confirmation page.

Step 12: Click **Back to My Flexible Exception Reports** to navigate to a list view of all your flexible exception reports. Click **Back to Report** to return to the Reports landing page.

### ***Delete Exception Report***

This function allows you to delete any Flexible Exception Reports that you have previously created.

Step 1: Click **Delete** under Actions beside the Exception Report. The application will initiate the Delete Flexible Exception Report workflow.

Step 2: Click **Delete** to finish the process.

### ***View Exception Report***

This function allows you to view any reports that have been generated based upon the Flexible Exception Criteria that you have specified.

Step 1: Click **View Report** under Actions beside the Exception Report. The application will display the report online for you to review.

Step 2: Once the application has generated the report for you, you may choose to **Download** it to .csv or .xls.

## **Standard Reports**

As a fleet card customer, you may have chosen to subscribe to various Standard Reporting options to help you manage your fleets and your expenses. To access these reports, you will utilize the Standard Reports feature.

### ***View Standard Reports***

Step 1: Shortcuts > Standard Reports > View Standard Reports or click **View Standard** from the Standard Reports tile on the Reports landing page. The application will render a search page, where you may search for your reports.

Step 2: Enter a date range for which to search for reports. Note: We recommend that you select a 90-day date range.

Step 3: Select a hierarchy level / account for which your reports were generated.

Step 4: Click **Search** to locate reports that meet your filter criteria. The application will render a results page.

### ***Retrieve Standard Reports***

Step 1: From the list view of your Standard Reports, click **Retrieve** within the Actions column. (Note: If your report is a pdf file, you may retrieve more than one at a time by clicking on the check box beside the pdf files and clicking **Create PDF** at the bottom of the page. The application will allow you to consolidate your pdf files into a single report, up to 5000 pages in length.)

Step 2: The application will allow you to save your retrieved report to your computer.

### ***Manage Standard Report Delivery Preferences***

Step 1: Shortcuts > Standard Reports > Manage Delivery Preference or click **Manage Delivery Preferences** from the Standard Reports tile on the Reports landing page.

Step 2: Enter the hierarchy level / account for which you wish to Manage Delivery Preferences.

Step 3: Click **Next** to proceed to the next step in the workflow. The application will render a list of Standard Reports at the selected level for which you may alter your delivery preferences.

Example1:

Reports

Reports Home

Ad Hoc Reports

Transaction Details

Transaction Summary

Exceptions

My Flexible Exception Reports

View Exception Reports

Add Exception Report

Standard Reports

View Standard Reports

Manage Delivery Preferences

Manage Delivery Preferences

You may select a delivery method for each report, or you may choose to stop a report from being produced. You may change your selections at any time, but reports that have not been produced cannot be recreated.

Current Active Reports

Report Name	Online	Stop Production
Invoice Statement	<input checked="" type="radio"/>	<input type="radio"/>

Reset

Submit

Example 2:

Reports

Reports Home

Ad Hoc Reports

Transaction Details

Transaction Summary

Exceptions

My Flexible Exception Reports

View Exception Reports

Add Exception Report

Standard Reports

View Standard Reports

Manage Delivery Preferences

Manage Delivery Preferences

You may select a delivery method for each report, or you may choose to stop a report from being produced. You may change your selections at any time, but reports that have not been produced cannot be recreated.

Current Active Reports

Report Name	Online	Stop Production
Tax Summary	<input checked="" type="radio"/>	<input type="radio"/>

Reset

Submit

Step 4: Each report may have different options for delivery. Some reports may be available via Mail and Online. (In order to decrease the mailing of paper reports, we offer this opportunity for you to receive these reports online only.) In some cases, you may choose to stop receiving the report altogether. However, the Invoice Statement cannot be turned off.

Step 5: Once you have made your updates, click **Submit** to commit your changes. To undo any changes you made, click **Reset**.

Step 6: Once you click **Submit**, the application will render a confirmation message.

## Custom Reports

The Custom Reports feature allows you to use System Templates as a foundation for building your own custom reporting tools. The System Templates allow you to generate the following types of reports:

**Account Profile** – This template allows you to generate reports that provide an overview of all the accounts and org units within your hierarchy. For each account or org unit, the

Online Help – Reports Module

Page 11 of 23

Updated: 4/20/2012

Confidential and Proprietary. Wright Express Corporation

report will provide details regarding addresses (shipping, billing, primary and physical), total drivers and/or vehicles, total cards, default authorization profile, and primary shipping method and carrier.

**Authorization Activity** – This template helps you build a custom report with a direct view of authorization activity, including declines transactions. This level of access to detailed authorization data helps you make informed decisions and perform analysis to help manage and enforce driver purchasing policies.

**Card Profile** – This template allows you to generate reports by which you can monitor and review card data based on a comprehensive view of card attributes or just a few specific card details.

**Driver Profile** – Reports based on this template allow you to monitor and review driver data based on comprehensive information, including account assignment, name, status and date of last transaction. Note: If you have Vehicle Cards, and you manage Drivers who uses these cards, you will see this template. You will not see the Vehicle Profile Template.

**Vehicle Profile** – Reports based on this template allow you to monitor and review vehicle data based on comprehensive information, including account assignment, name, status and date of last transaction. Note: If you have Driver Cards, and your drivers utilize these cards in various vehicles, you will see this template. You will not see the Driver Profile Template.

**Transaction Management** – This template permits you to generate a transactional-level report, whereby you may analyze usage at certain merchants, or within certain timeframes, or exceeding specified dollar amounts.

### ***Create Custom Report***

The Create Custom Report feature leads you through a wizard-based tool, enabling you to customize our System Templates to meet your reporting needs.


Step 1: Shortcuts > Custom Reports > Create New Report or click **Create New Report** from the My Custom Reports tile on the Reports landing page. The application will initiate the Create New Report workflow.

Shortcuts

- Reports
  - Reports Home
  - Ad Hoc Reports
    - Transaction Details
    - Summary
    - Exceptions
  - My Flexible Exceptions
    - Add Exception Report
    - View Exception Reports
  - Standard Reports
    - View Standard Reports
    - Manage Delivery Preferences
  - My Custom Reports
    - Create New Report
    - View My Reports
    - View My Templates
  - Real-Time Alerts
    - View Real-Time Alerts

Create New Report

Select System Template



Select one of the templates below as a starting point to create, run, and save a custom report. For further information on each template, select **View Details**

Account Profile Report

Choose this template to obtain a custom report that itemizes the accounts within your hierarchy and provides details regarding those accounts including Contact Name, Shipping Information, Total Cards, Total Driver Prompts, Card type, Accounts, Org Units, and Total Vehicle Prompts.

View Details

Create Report

Authorization Activity Report

Use this template to build a custom report that provides you with a direct view of authorization activity. Access to detailed authorization data helps you make informed decisions and perform analysis to help manage and enforce driver purchasing policies.

View Details

Create Report

Card Profile Report

Use this template to build a custom report with a broad view of cards across multiple accounts or focused on a single account. Reports based on this template allow you to monitor and review card data based on a comprehensive view of card attributes or just a few specific card details.

View Details

Create Report

Driver Profile Report

Use this template to build a custom report with a broad view of drivers across multiple accounts or focused on a single account. Reports based on this template allow you to monitor and review driver data based on comprehensive information, including account assignment, name, status, and date of last transaction.

View Details

Create Report

Transaction Management Report

Select this template to generate a transaction-level report that allows you to analyze usage at certain merchants or within specified dollar amounts or within selected accounts. Reports based upon this template will also enable you to view transactions within certain time periods.

View Details

Create Report

Vehicle Profile Report

Use this template to build a custom report with a broad view of vehicles and assets across multiple accounts or focused on a single account. Reports based on this template allow you to monitor and review vehicle data based on comprehensive information, including account assignment, name, status, and date of last transaction.

View Details

Create Report

[Home](#) | [Fleet Manager](#) | [Financials](#) | [Reports](#) | [Resource Tools](#) | [Administration](#)  
[My Preferences](#) | [Help](#) | [Contact Us](#) | [Terms & Policies](#) | [Accessibility](#) | [Logout](#)  
©2009, Wright Express Corporation

Step 2: Select a System Template on which to base your Custom Report. If you are uncertain which template you'd like to use, you may click **View Details** within the template tile to learn more about the template's purpose.

Step 3: Upon clicking **View Details**, the application will render the View Template Details page. The View Details page will itemize each of the fields on the report, identify those that are required to remain on the report (and indicate those that you may remove from the report), and illustrate those fields which are filterable.

Step 4: Once you have selected a System Template, click **Create Report**. The application will proceed to the next step in the workflow.

**Shortcuts**

- Reports
  - Reports Home
  - Ad Hoc Reports
    - Transaction Details
    - Summary
    - Exceptions
  - My Flexible Exceptions
    - Add Exception Report
    - View Exception Reports
  - Standard Reports
    - View Standard Reports
    - Manage Delivery Preferences
  - My Custom Reports
    - Create New Report
    - View My Reports
    - View My Templates
  - Real-Time Alerts
    - View Real-Time Alerts

**Create New Account Profile Report**

**Step 1 of 6: Select Accounts**

Step 1: Select Accounts | Step 2: Select Fields | Step 3: Apply Filters | Step 4: Arrange Fields | Step 5: Name Report | Step 6: Save Report

**Select Hierarchy Level(s) / Account(s)**  
Select the hierarchy level(s) / account(s) to be included in the report. All accounts below the selected level will be included in the report.

☐ Select All  
[Expand / Collapse](#)

- ☒ Level 1: Corporate Parent Training Demo 2 - 0496001283316
  - ☐ Level 2: Midwest Region - 0496001462357
  - ☒ Level 2: New England Region - 0496001283332
    - ☒ Level 3: Boston Sales Inc. - 0496001323997
      - ☐ Level 4: Suffolk County Inc. - 0496001324003
      - ☐ Level 4: Worcester Division - 0496001445246
  - ☒ Level 2: Pacific Northwest Region - 0496001283407
    - ☐ Level 3: Electric Fueling Unit - 0496001482066
  - ☐ Level 2: South Central Region - 0496001283423
  - ☒ Level 2: Southwest Region - 0496001492966
    - ☐ Level 3: Arizona - 0496001493188
    - ☐ Level 3: Colorado - 0496001493196
    - ☐ Level 3: Kansas - 0496001493212
    - ☐ Level 3: Louisiana - 0496001493220
    - ☐ Level 3: Nevada - 0496001493238
    - ☐ Level 3: New Mexico - 0496001493253
    - ☐ Level 3: Oklahoma - 0496001493287
    - ☐ Level 3: Texas - 0496001493295
    - ☐ Level 3: Utah - 0496001493303

Step 5: Select the hierarchy level(s) / account(s) to include in your report. Note: Any children nodes beneath the level(s) you select will be included in the report. The application will automatically check off the children nodes for you.

Step 6: Once you have made your selections, click **Next**. The application will proceed to the next step in the workflow.

Step 7: The application allows you to remove fields from the report. The Select Fields page itemizes all the fields that will appear on the report, by default, and allows you to deselect the ones you don't wish to include. Note: Some fields are required, in order for the report to be generated. Required fields are identified by a green checkmark in the "Required" column. Use the check boxes to choose the fields that will be included on your report.

Step 8: Click **Next** to proceed to the next step in the workflow.

Step 9: Each System Template offers various filtering options. The Apply Filters page will itemize the filters that are available for your selected template, minus any fields that you chose to exclude in the previous step. Employing these filters is optional. Some filters offer a List of Values (LOV) from which you may select your filter criteria; others require you to enter your filter criteria in the space provided.

Step 10: Enter any filters, and click **Next** to proceed to the next step in the workflow.

Step 11: Each System Template allows you to determine the order in which the fields will appear on the report. The Arrange Fields page allows you to drop and drag the fields into your desired order. You may also re-number the fields so that they are in your preferred order. To review your updates, you may click **Update**. You may, at any time, return to the system default order by clicking the **Reset** button.

Step 12: Once you have made your updates, click **Next**. The application will proceed to the next step in the workflow.

Step 13: Enter a Report Name in the field provided. You may also choose to enter a Description, if you feel it will help you keep track of each of your reports.

Step 14: Complete your entries and click **Next** to proceed to the next step in the workflow.

Step 15: Review the parameters for your new report on the Report Summary page. If the report meets your needs, you may click **Save and Run Now**, in order to render the report immediately. If you'd prefer merely to save your template at this time, you may click **Save**. Your template will be saved to the View My Templates page. If you feel that this is a dataset that you would like to retrieve on a regular basis, you may select **Schedule**. The application will allow you to select a Schedule Frequency (Daily, Weekly, Monthly, Quarterly, or Yearly).

Step 16: If you opt to **Save and Run Now**, the application will prompt you to select an output format. Note: In some cases, you will also be asked to enter a Date Range for which to generate your report. Both the Authorization Activity Report and the Transaction Management Report require the entry of a Date Range.

Step 17: If you opt to **Schedule**, the application will prompt you to select a Frequency. The Frequency options include Daily, Weekly, Monthly, Quarterly, and Yearly. (Note: The Authorization Activity Report may only be scheduled to run Daily or Weekly.) In addition, the Schedule workflow also permits you to choose the manner in which you'd like your scheduled reports delivered. Your options include online, email, and SFTP (secure FTP site).

If you wish to take advantage of the SFTP option, please contact your Wright Express representative for additional assistance.

Shortcuts

Schedule Report Account Profile Report -- Southwest

**Schedule Report Results**

Scheduled reports will be available the day following the scheduled run date. Fields marked with an asterisk (\*) are required.

**Report Options**

\* Frequency:

\* Day of the week:

Note: If the results are too large for an Excel file, a CSV will automatically be generated.

☒ CSV ☐ Excel

**Delivery Options**

Please Contact your Wright Express representative to setup a secure FTP site.

☒ Online ☐ Email ☐ SFTP

If you elect to take advantage of the **Email** delivery option, the system will advise you of the potential risks inherent in this delivery option, as shown below. You will have the opportunity to enter one or more email addresses to which to send the report. The system will also offer you the opportunity to include or exclude potentially sensitive Driver and / or Vehicle Prompt ID values. Generally, this information is protected for security purposes; therefore, it is advisable to exclude these values from any reports that you choose to email.

Shortcuts

- Reports
  - Reports Home
  - Ad Hoc Reports
    - Transaction Details
    - Transaction Summary
    - Exceptions
  - My Flexible Exceptions
    - Add Exception Report
    - View Exception Reports
  - Standard Reports
    - View Standard Reports
    - Manage Delivery Preferences
  - My Custom Reports
    - Create New Report
    - View My Reports
    - View My Templates
  - Real-Time Alerts
    - View Real-Time Alerts

Schedule Report Account Profile Report -- Southwest

Schedule Report Results

Scheduled reports will be available the day following the scheduled run date. Fields marked with an asterisk (\*) are required.

Report Options

\* Frequency: Weekly

\* Day of the week: Monday

Note: If the results are too large for an Excel file, a CSV will automatically be generated.

☒ CSV
☐ Excel

Delivery Options

You are electing to distribute potentially sensitive account information to one or more users who may not have permission to view this information. It is your responsibility to ensure the email address(es) provided are permitted to receive this data.

Please Contact your Wright Express representative to setup a secure FTP site.

☐ Online
☒ Email
☐ SFTP

\* Email Addresses:

jenn\_willetc@wrightexpress.com

Enter one or more email addresses to send your report. Separate each email address with a semi-colon (;).

Include Private Information

If you choose to Include Private Information in this report, you will be transmitting Driver and / or Vehicle Prompt IDs. For data security reasons, this is not recommended.

☐ Yes
☒ No

Back

Apply

Cancel

Step 18: Once you have made your selections, click **Apply**. Once you click **Apply**, your template will be saved to the View My Templates page and the report will be generated on the schedule you requested. When a scheduled report has been generated, you will be notified via an alert on the Home Page and you will receive an email notification. You may retrieve your report on the View My Reports page.

## View My Templates

Once you have created a customized report based upon one of our System Templates, you may retrieve the template at any time. For on-demand reports, you may Edit, Delete, or Run your templates; for scheduled reports, you may Edit or Delete your templates.

Step 1: Shortcuts > My Custom Reports > View My Templates or click **View My Templates** within the My Custom Reports tile on the Reports landing page. The application will render the View My Templates page.



**Shortcuts**

- Reports
  - Reports Home
  - Ad Hoc Reports
    - Transaction Details
    - Transaction Summary
    - Exceptions
  - My Flexible Exception Reports
    - View Exception Reports
    - Add Exception Report
  - Standard Reports
    - View Standard Reports
    - Manage Delivery Preferences
  - My Custom Reports
    - Create New Report
    - View My Reports
    - View My Templates

**Custom Reports**

**View My Templates**

Below is a listing of the reports that you have created based upon the system templates. You may choose to Edit or Delete these reports. For Scheduled Reports, if you wish to change the frequency by which a report is being run, please choose the Edit option. For On-Demand reports, you may generate the report by selecting Run Now.

**Search Filter**  
You may filter a search by any of the following:

Report Name:   
System Template:

**Download Results:**

Previous | Next      Displaying 1-2 of 2 Records Found.      Results per page 25 | Go

Report Name <small>Description Frequency</small>	System Template	Actions
<b>Driver Profile Sample</b> Sample for the Manual On Demand	Driver Profile Report	<a href="#">Run Now</a> <a href="#">Edit</a> <a href="#">Delete</a>
<b>Trans Mgmt Report</b> Sample Report for Manual Scheduled	Transaction Management Report	<a href="#">Edit</a> <a href="#">Delete</a>

Previous | Next      Displaying 1-2 of 2 Records Found.      **Download Results:**

Step 2: You may use the Search Filter offered at the top of the list view in order to locate a specific report template.

Step 3: The list view can be re-sorted by any field listed in the column header.

### **Run (Template) Now**

You may locate any on-demand Custom Report Template that you have created and choose to run it at any time.

Step 1: From the list view of your templates, click **Run Now** in the Actions column beside the desired on-demand template. Once you click **Run Now**, the application will prompt you to select an output format. Note: In some cases, you may be asked to enter a Date Range for which to generate your report. Both the Authorization Activity Report and the Transaction Management Report require the entry of a Date Range.

Step 2: Select a download format (either .csv or .xls) and click **Download**. If you no longer wish to download the report, you may click **Back to View My Templates** to navigate to the page where your customized templates are stored. Alternatively, you may click **Create New Report** to customize another System Template.

Step 3: Once you click **Download**, the application will initiate the download process and render the report for you.

## **Edit Template**

You may edit any Custom Report Template that you have created, in order to make it meet your reporting needs. When you edit a template, you will also have the opportunity to convert it from an on-demand report to a scheduled report, and vice versa.

Step 1: From the list view of your templates, click **Edit** in the Actions column beside the desired template. The application will initiate the Edit Custom Report workflow. The Edit workflow will lead you through the steps that you previously followed to create a new report. For more information on the steps involved in creating a report, please refer to the Create New Report section.

Note: If you know which step(s) you wish to edit, you may skip directly to the desired step(s) by clicking on the step-by-step navigation at the top of each page. For instance, if you merely wish to re-name your report, you may click on Step 5 and the system will navigate you directly to Step 5, skipping over the intervening steps.



## **Share (Template)**

Once you have created a template, you may conclude that the report would be valuable for other members within your organization. Perhaps you have other team members who frequently ask you for information regarding Drivers within their accounts and you have the perfect report template to address these inquiries. Rather than each team member creating his or her own version of your perfect report, you can share your template with these users and they can take advantage of your pre-existing template.

Step 1: From the list view of your templates, click **Share** in the Actions column beside the desired template. The application will initiate the Share Template workflow.

Shortcuts

Reports

Reports Home

Ad Hoc Reports

Transaction Details

Summary

Exceptions

My Flexible Exceptions

Add Exception Report

View Exception Reports

Standard Reports

View Standard Reports

Manage Delivery Preferences

My Custom Reports

Create New Report

View My Reports

View My Templates

Real-Time Alerts

View Real-Time Alerts

Custom Reports

Share My Template

Sharing Information

You may share this report template with users within the accounts you select below. Sharing a template will provide users with a copy of this exact template for their own personal use. To customize a shared template, each user must clone the shared version of the template. Once the template has been cloned, the user may edit the report parameters as needed. When you share a template, a shared version will appear on your View My Templates page. You may edit the accounts to which the template is shared or you may delete the shared version from this page.

Fields marked with an asterisk (\*) are required.

\* Report Name:   
Max of 40 characters.

Description:   
Max of 50 characters.

Select Hierarchy Level(s) / Account(s)

Select the hierarchy level(s)/account(s) to which you want to share this template. All users having access to create custom reports will be provided with a copy of this template which they need to clone in order to generate report output.

Sharing mode:  Changing this option will clear your previous selections.

☐ Select All Expand | Collapse

☒

Level 1: Corporate Parent Training Demo 2 - 0496001283316

☐

Level 2: Midwest Region - 0496001462357

☒

Level 2: New England Region - 0496001283332

☒

Level 3: Boston Sales Inc. - 0496001323997

☐

Level 4: Suffolk County Inc. - 0496001324003

☐

Level 4: Worcester Division - 0496001445246

☒

Level 2: Pacific Northwest Region - 0496001283407

☐

Level 3: Electric Fueling Unit - 0496001482066

☐

Level 2: South Central Region - 0496001283423

☒

Level 2: Southwest Region - 0496001492966

☐

Level 3: Arizona - 0496001493188

☐

Level 3: Colorado - 0496001493196

☐

Level 3: Kansas - 0496001493212

☐

Level 3: Louisiana - 0496001493220

☐

Level 3: Nevada - 0496001493238

☐

Level 3: New Mexico - 0496001493253

☐

Level 3: Oklahoma - 0496001493287

☐

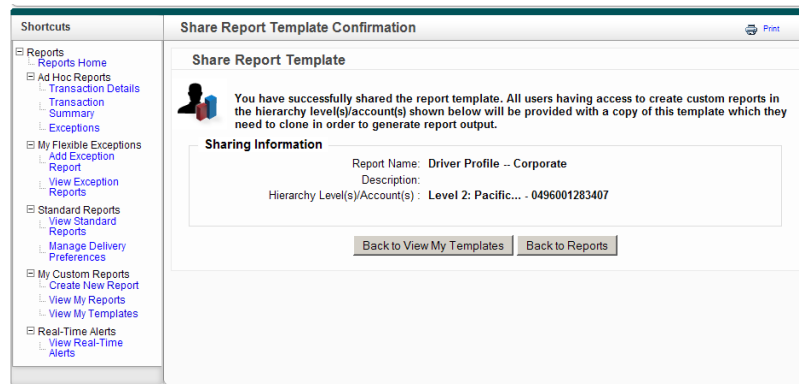
Level 3: Texas - 0496001493295

☐

Level 3: Utah - 0496001493303

Step 2: In order to share your template, you must select the Hierarchy Level(s) / Account(s) to which to share the template. Using the check boxes, choose the accounts to which the template shall be shared. Note: You may choose to share only to the exact accounts you select or you may choose to share to the accounts you select and their children nodes.

Step 3: Once you have selected the desired Hierarchy Level(s) / Account(s), click **Submit**. The system will render a confirmation page, as follows:



Step 4: On the “View My Templates” page, you will note that the template you shared exists in two incarnations: your original “Private” version and the “Shared” version that you have provided to other users.

<b>Driver Profile -- Corporate</b> On Demand   Online	Driver Profile Report <b>Private</b>   Jennifer Willett 04/20/2012	<a href="#">Run Now</a> <a href="#">Edit</a> <a href="#">Share</a> <a href="#">Delete</a>
<b>Driver Profile -- Corporate</b>	Driver Profile Report <b>Shared</b>   Jennifer Willett 04/20/2012	<a href="#">Edit Sharing</a> <a href="#">Delete</a>

Step 5: If you no longer wish to share your template, you may **Delete** the shared version. If you wish to modify the Hierarchy Level(s) / Account(s) to wish the template is shared, you may select **Edit Sharing**.

### ***Clone (Template)***

You may discover that you are the recipient of a Shared Template from another user in your hierarchy who felt that you might find a given template useful in your daily activities. If another user has shared a template with you, you will see this template on your View My Templates page. It will be tagged as “Shared” and it will identify the user who chose to share the report with you, as shown below:

Previous   Next		Displaying 1-3 of 3 Records Found.	Results per page 25 Go
Report Name Description Frequency   Delivery	System Template Shared   Owner Last Update Date	Actions	
Driver Profile -- Corporate	Driver Profile Report Shared   Jennifer Willett 04/20/2012	Clone	
Driver Profile WO Prompt ID On Demand   Online	Driver Profile Report Private   Kathy Smith 01/29/2010	Run Now Edit Share Delete	
Trans Mgmt WO Prompt ID On Demand   Online	Transaction Management Report Private   Kathy Smith 01/29/2010	Run Now Edit Share Delete	
Previous   Next		Displaying 1-3 of 3 Records Found.	

To utilize this shared template, you must **Clone** it to suit your needs.

Step 1: From the list view of your templates, click **Clone** in the Actions column beside the shared template you wish to utilize. The application will initiate the Clone Template workflow. You may proceed through the Clone Template workflow as though you were editing an existing report. The parameters that the person sharing the template pre-selected will be identified for you, but you may edit them to meet your needs. Any parameters that the person sharing the template employed to which you do not have access will be erased. For instance, if the person sharing the report opted to filter by a particular card number, and your login does not have access to this card number, then this filter will be erased from the shared version of the template.

### **Delete (Template)**

You may delete any on-demand or scheduled Custom Report Template that you have created, if you no longer wish to store it for future use.

Step 1: From the list view of your templates, click **Delete** in the Actions column beside the desired template. The application will initiate the Delete Template workflow.

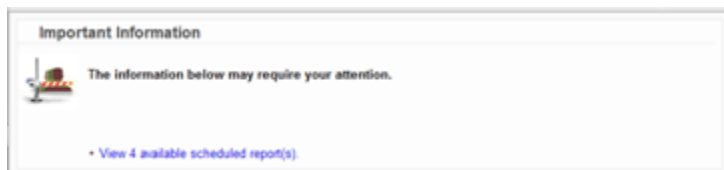
Step 2: Click **Apply** to delete the template. The application will render a confirmation page.

Step 3: Click **Back to My Custom Reports** to return to the list view of your stored templates. Click **Back to Reports** to navigate to the Reports landing page.

### **View My (Scheduled) Reports**

Once you have created a scheduled report based upon one of the System Templates, the application will generate your report for you, on the timetable you requested. When a scheduled report becomes available for you to download, the application will notify you via

an alert on the Home Page and will send you an email advising you that a new report has been generated. The system will store the report for you on the View My Reports page.



Step 1: Shortcuts > My Custom Reports > View My Reports or click **View My Reports** within the My Custom Reports tile on the Reports landing page. The application will render the View My Reports page.

Step 2: You may use the Search Filter offered at the top of the list view in order to locate a specific report.

Step 3: The list view can be re-sorted by any field listed in the column header.

### ***Download (Report)***

Once you have located the scheduled report output in the list view, you may opt to download it. Note: Reports will remain available for download for 90 days.

Step 1: From the list view of your reports, click **Download** in the Actions column beside the desired report. The application will download the report for you, in a .csv or .xls format.

### ***Delete (Report)***

You may delete any scheduled report that has been generated for you, once you no longer need it. Note: Reports will be automatically purged after 90 days.

Step 1: From the list view of your reports, click **Delete** in the Actions column beside the desired report. The application will initiate the Delete Template workflow.

Step 2: Click **Apply** to proceed with deleting the report. Click **Cancel** to return to the View My Reports page.

### **Access Quick Links**

On the bottom center of every page within the website, persistent hyperlinks allow quick access to certain features on the website. Quick Links include:

[Home](#): Navigates back to the Home Page.

[Fleet Manager](#): Links to account maintenance functions.

[Financials](#): Provides access to accounting fields and definitions, and allows you to assign financial profiles throughout your hierarchy.

[Reports](#): Navigates to the various ad hoc, exception, and custom reporting tools.

[Resource Tools](#): Offers value-added features such as site directory search.

[Administration](#): Provides access to user maintenance and custom roles.

[My Preferences](#): Links to functions allowing you to set or edit your user preferences.

[Contact Us](#): Allows you to request assistance via email.

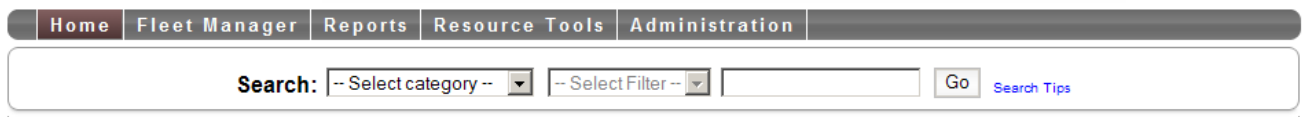
[Terms & Policies](#): Itemizes the conditions to which you agreed when you subscribed to this site.

[Accessibility](#): Provides information on the site's adherence to Section 508 of the Rehabilitation Act.

[Logout](#): Discontinues your session.

## Global Search

In order to facilitate the ability to locate certain entities within your hierarchy, the application offers a Global Search tool. This feature can be found beneath the persistent menu options on every page within the application. Global Search allows you to locate Cards, Drivers, Vehicles, and Authorization Profiles by selecting a filter option and entering a filter value. Once you initiate your search, the application will look through all the accounts within your hierarchy to find the entity you are seeking. This saves you from having to drill through, hierarchy level by hierarchy level, to find the entity.



Step 1: Select a category from the list of values. Your choices include Authorization Profiles, Cards, Drivers, and Vehicles, as applicable to your specific hierarchy set-up.

Step 2: Select a filter from the list of values. The available filters are dependent upon the category on which you have chosen to search.

Step 3: Enter your filter value in the field provided. You may enter an exact value, such as Brown. Or you may perform a wildcard search using an asterisk (\*), such as b\*. Your entries will not be subjected to case-sensitivity. For additional tips on what to enter in the filter value field, click **Search Tips**.

Step 4: Once you have made your entries, click **Go**. If your search results in a single result, the application will immediately navigate you to the details of your result within the Fleet Manager module, where you may proceed to review the details associated to the entity and manage that entity.

Step 5: If your search returns more than one result, then the application will render an intermediate results page, whereby you may review the results and choose the entity that you are seeking.

Step 6: The list view provides you with general details regarding each entity that was located. To view additional details, you may click on the hyperlinked entity name or click **View Details** within the Actions column beside the desired entity. The application will navigate to the details of your result within the Fleet Manager module, where you may proceed to review the details associated to the entity and manage that entity.

Step 7: You may proceed to act upon the entity using the available Actions in the upper right hand corner. Click **Back to Results** to return to the intermediate results page.